



**SFMTA**  
Municipal  
Transportation  
Agency

# Strategic Plan Progress Report

## *Goal 4 Focus*

May 2017

San Francisco, California

# Goal 4 focus

Create a workplace that delivers outstanding service

## **Objective 4.1**

Improve internal communications

## **Objective 4.2**

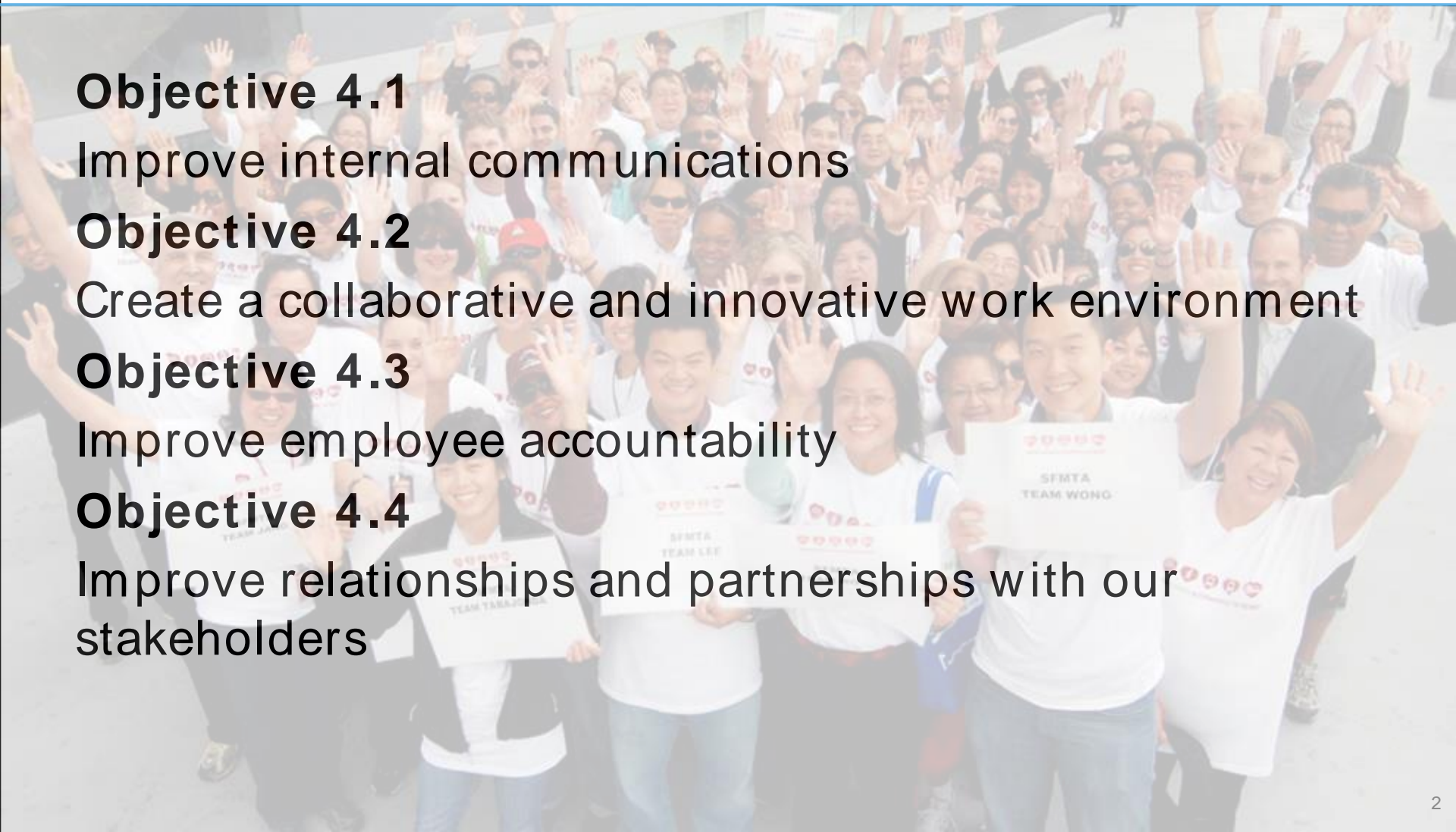
Create a collaborative and innovative work environment

## **Objective 4.3**

Improve employee accountability

## **Objective 4.4**

Improve relationships and partnerships with our stakeholders

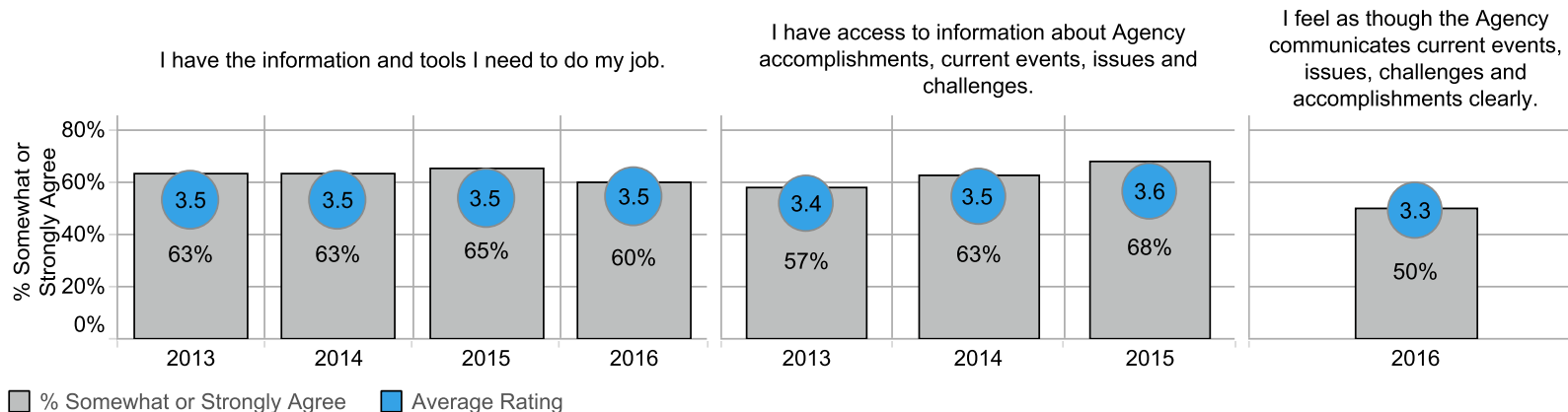


# Objective 4.1

## Improve internal communications

### Key performance indicator

#### 4.1.1 Employee Rating: Access to Agency information and tools needed to do my job



### Other indicators (including most recent month, prior month, same month prior year, and fiscal year averages)

ID	Metric	Target	2014 Avg	2015 Avg	2016 Avg
4.1.1	Employee rating: I have the info and tools I need to do my job; scale of 1 (high) to 5 (low)	4.0	3.5	3.5	3.5
4.1.1	Employee rating: I have access to info about Agency accomplishments, current events, issues and challenges.	3.9	3.5	3.6	-
4.1.1	Employee rating: I feel as though the Agency communicates current events, issues, challenges and accomplishments clearly.		-	-	3.3
4.1.2	Percentage of employees that complete the survey		29.6%	27.2%	29.7%
4.1.3	Employee rating: I have a clear understanding of my division's goals/objectives and how they contribute to Agency success.		3.5	3.6	3.6
4.1.4	Employee rating: I have received feedback on my work in the last 30 days.		3.1	3.1	3.1
4.1.5	Employee rating: I have noticed that communication between leadership and employees has improved.		3.0	3.0	2.9
4.1.6	Employee rating: Discussions with my supervisor about my performance are worthwhile.		3.5	3.5	3.4

4.1.1 Survey question for 4.1.1 was reworded in the 2016 employee satisfaction survey.

Note: Reported results are subject to change as data quality improves or new data become available.

# Objective 4.1

## Improve internal communications

### Key action item updates

#### 4.1.A: Develop and implement a Digital Internal Communications Strategy

Nine out of the ten pilot screens are fully functional, and plans are being developed to end pilot early and roll-out digital signage to 30 locations. Expanded display content to include agency performance data and information from the Wellness Council.

#### 4.1.C: Develop an Equal Employment Opportunity Program

Drafted the EEO Strategic Plan and working with stakeholders to review and finalize the plan. Working with the Office of Economic and Workforce Development to establish partnerships with community-based and industry-based groups for EEO Program goals.

### Action item status

0% encountering issues

0% at risk

100% on track

0% on hold



0% completed

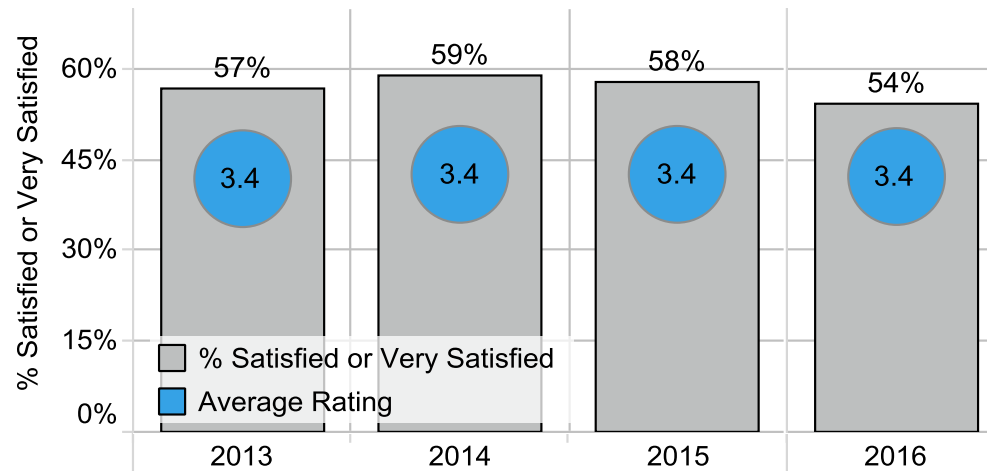


# Objective 4.2

## Create a collaborative and innovative work environment

### Key performance indicator

#### 4.2.1 Employee Rating: Overall employee satisfaction



### Other indicators (including most recent month, prior month, same month prior year, and fiscal year averages)

ID	Metric	Target	2014 Avg	2015 Avg	2016 Avg
4.2.1	Employee rating: Overall employee satisfaction; scale of 1 (low) to 5 (high)	3.9	3.4	3.4	3.4
4.2.2	Employee rating: My concerns, questions, and suggestions are welcomed and acted upon quickly and appropriately.		3.0	3.0	3.0
4.2.3	Employee rating: I find ways to resolve conflicts by working collaboratively with others.		4.0	4.0	4.0
4.2.4	Employee rating: I am encouraged to use innovative approaches to achieve goals.		3.4	3.3	3.3
4.2.5	Employee rating: Employees in my work unit share job knowledge to solve problems efficiently/effectively.		3.8	3.8	3.9
4.2.6	Employee rating: I feel comfortable sharing my thoughts and opinions, even if they're different than others..		3.7	3.6	3.5
4.2.7	Employee rating: My work gives me a feeling of personal accomplishment.		3.8	3.7	3.8

Note: Reported results are subject to change as data quality improves or new data become available.

# Objective 4.2

## Create a collaborative and innovative work environment

### Key action item updates

4.2.B Improve the efficiency and effectiveness of the hiring process

Completed an audit of hiring processes. Formulating recommendations and actions for implementation, including: communications of opportunities, digitization of processes, and greater transparency in process.

4.2.C Improve Recruitment for SFMTA positions

Identified and attended job fairs: Learners' Guild, Tech-Hire, Mayor's Youth Jobs Initiative, Veterans' Job Fair, and the CCSF - Mission Campus Job Fair. Leveraging existing on-line employment and recruitment sites like LinkedIn.

### Action item status

0% encountering issues

0% at risk

100% on track

0% on hold



0% completed

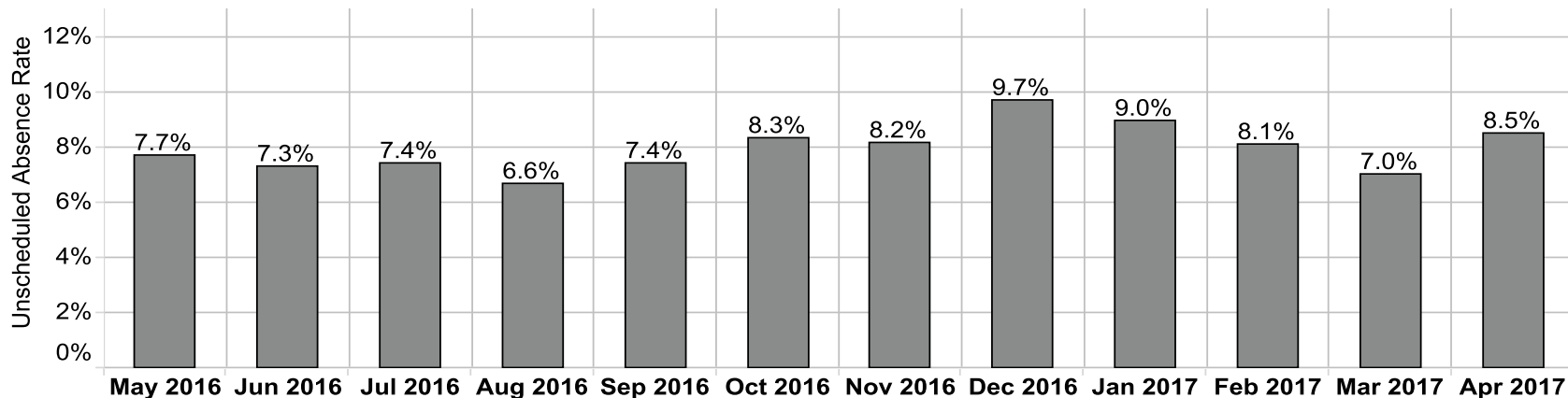


# Objective 4.3

## Improve employee accountability

### Metric of note

4.3.3 Unscheduled absence rate by employee group (Transit operators)



### Other indicators (including most recent month, prior month, same month prior year, and fiscal year averages)

ID	Metric	Target	FY16 Avg	FY17 Avg	Apr 2016	Mar 2017	Apr 2017
4.3.1	Percentage of employees with performance plans prepared by start of fiscal year	100.0%	59.1%	*			
4.3.1	Percentage of employees with annual appraisals based on their performance plans	100.0%	58.9%	*			
4.3.2	Percentage of strategic plan metrics reported		96.1%				
4.3.3	Unscheduled absence rate by employee group (Transit operators)		8.6%	8.0%	9.9%	7.0%	8.5%
4.3.4	Employee rating: My manager holds me accountable to achieve my written objectives		3.6				
4.3.5	Employee commendations to 311		152	182	156	79	154

\*Data forthcoming. 2016 employee survey will be completed in September.

Note: Reported results are subject to change as data quality improves or new data become available.

# Objective 4.3

## Improve employee accountability

### Key action item updates

4.3.A Establish a new employee orientation program to support adoption of Agency standards and culture.

Researched current employee orientation programs and developed a new employee orientation program framework; Soft-launch of new program scheduled for July 2017.

4.3.B Expand the Employee Recognition Program.

Worked with city department communicators to learn about similar efforts to expand internal communications including recognition. Next steps include informational meetings to learn about successful programs already in place, as well as coordination with strategic planning efforts for implementation.

### Action item status

0% encountering issues

29% at risk

71% on track

0% on hold



0% completed



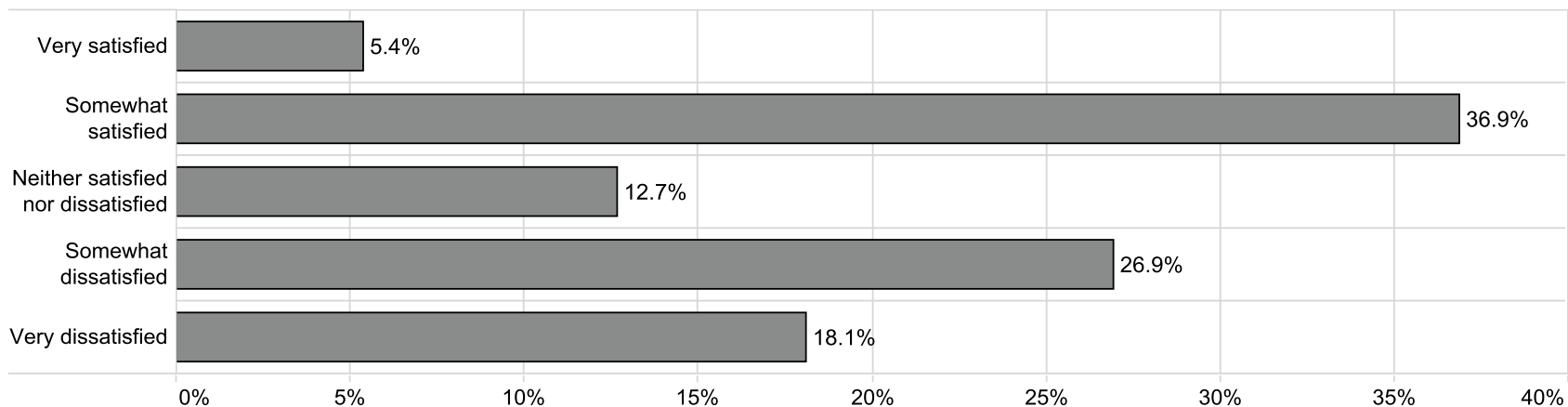


# Objective 4.4

## Improve relationships and partnerships with our stakeholders

### Key performance indicator

#### 4.4.1 Stakeholder rating: satisfaction with SFMTA management of transportation in San Francisco; scale of 1 (low) to 5 (high)



### Other indicators (including most recent month, prior month, same month prior year, and fiscal year averages)

ID	Metric	FY15 Avg
4.4.1	Stakeholder rating: satisfaction with SFMTA management of transportation in San Francisco; scale of 1 (low) to 5 (high)	2.9

# Objective 4.4

## Improve relationships and partnerships with our stakeholders

### Key action item updates

4.4.D: Implement Phase II of the Public Outreach & Engagement Team Strategy (POETS).

POETS, the Agency's Public Outreach & Engagement Strategy is current in Phase II, where we are fine tuning the ongoing Education Program, established last summer by adding additional training options and resources. The Recognition Program, in full swing has multiple staff certifying as Apprentices (entry level) and Specialists (mid-level) of P2, Public Participation practitioners. The metrics by which we will begin measuring the success and implementation of the program are currently being vetted.

### Action item status

0% encountering issues

0% at risk

100% on track

0% on hold



0% completed



# Goal 1 metrics

Create a safer transportation experience for everyone

## Objective 1.1

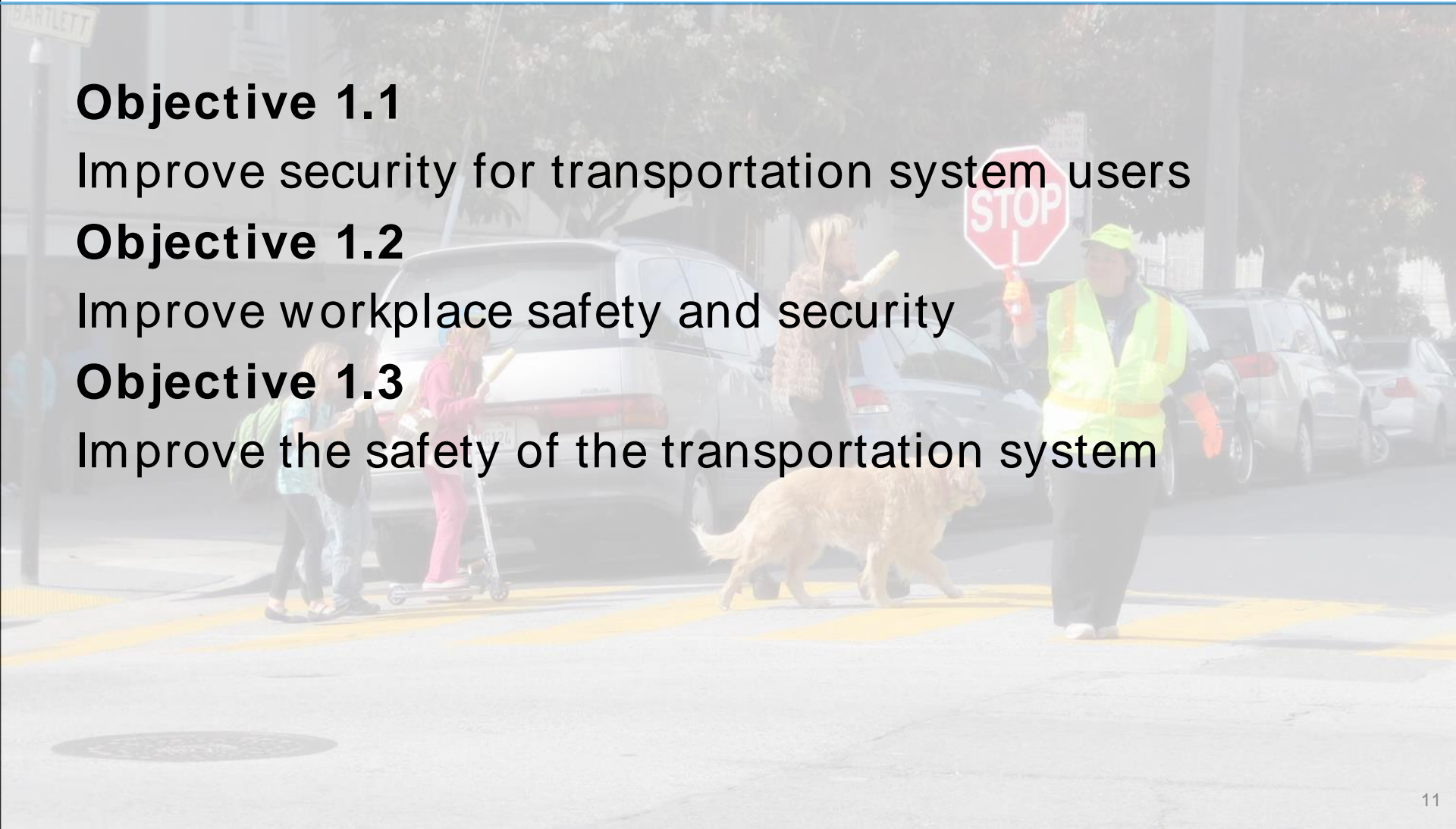
Improve security for transportation system users

## Objective 1.2

Improve workplace safety and security

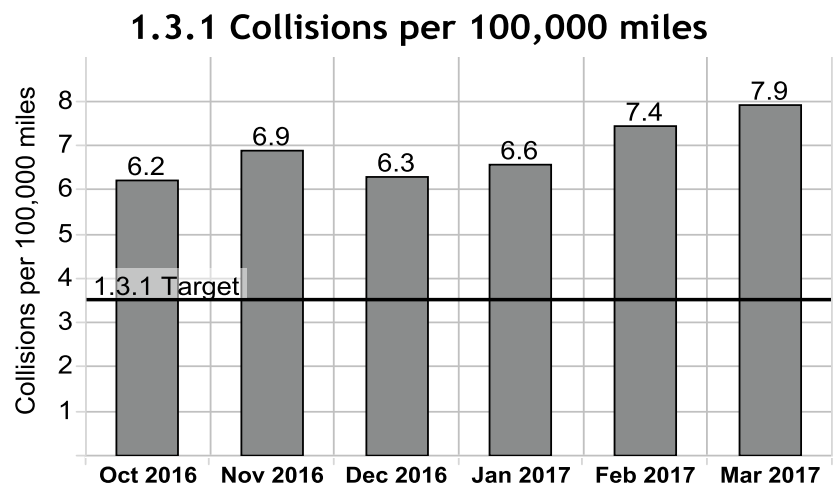
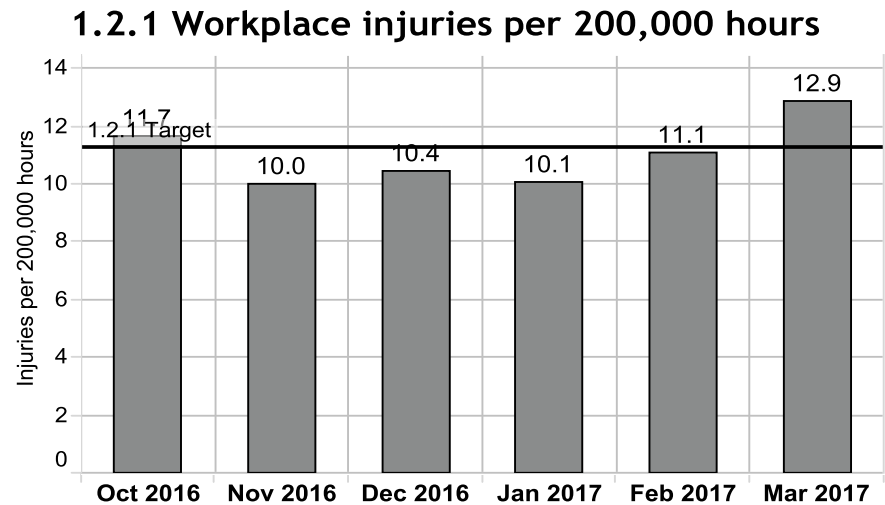
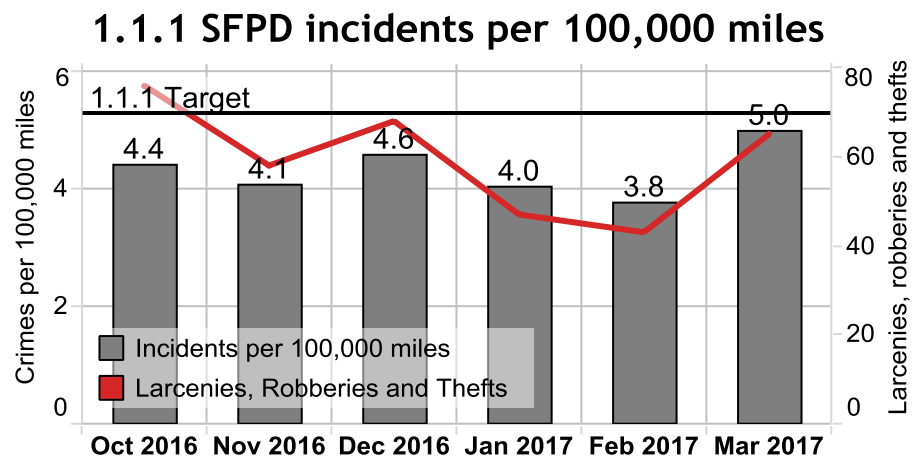
## Objective 1.3

Improve the safety of the transportation system



# Goal 1 metrics

## Key performance indicators



Note: Reported results are subject to change as data quality improves or new data become available.

# Goal 2 metrics

Make transit, walking, bicycling, taxi, ridesharing and carsharing the preferred means of travel

## **Objective 2.1**

Improve customer service and communications

## **Objective 2.2**

Improve transit performance

## **Objective 2.3**

Increase use of all non-private auto modes

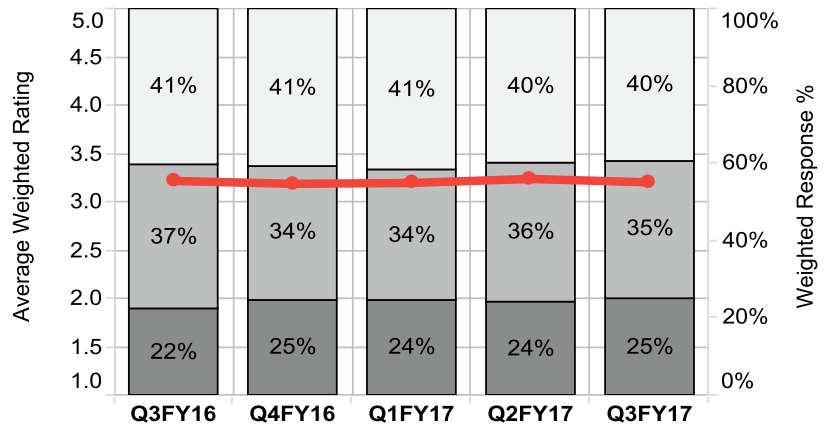
## **Objective 2.4**

Improve parking utilization and manage parking demand

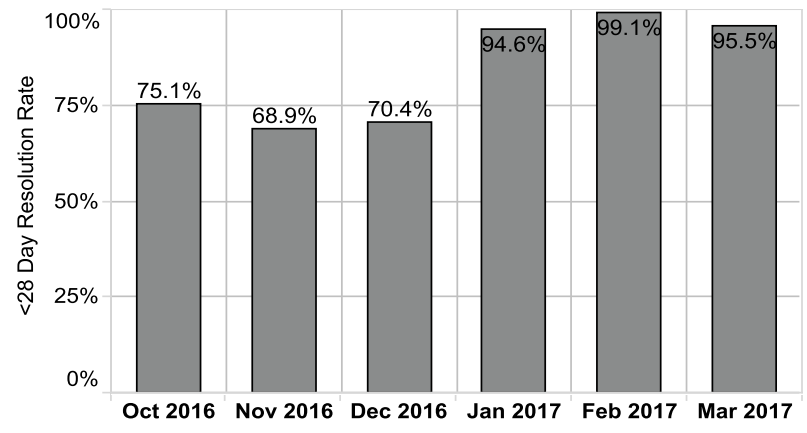
# Goal 2 metrics

## Key performance indicators

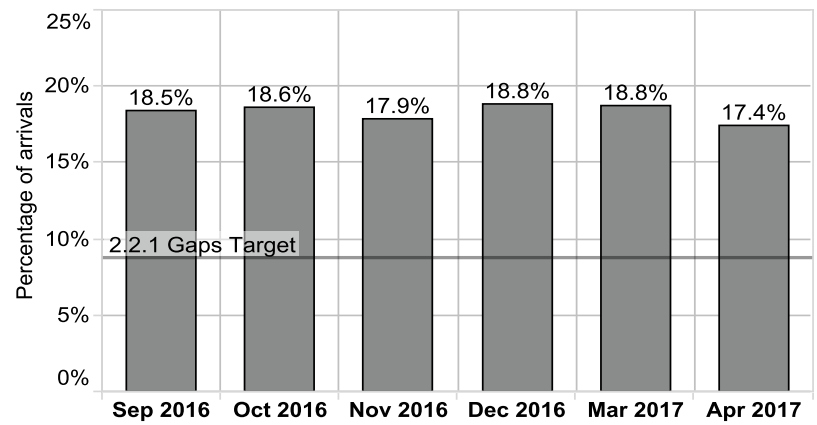
**2.1.1 Customer rating: Overall satisfaction with transit services; scale of 1 (low) to 5 (high)**



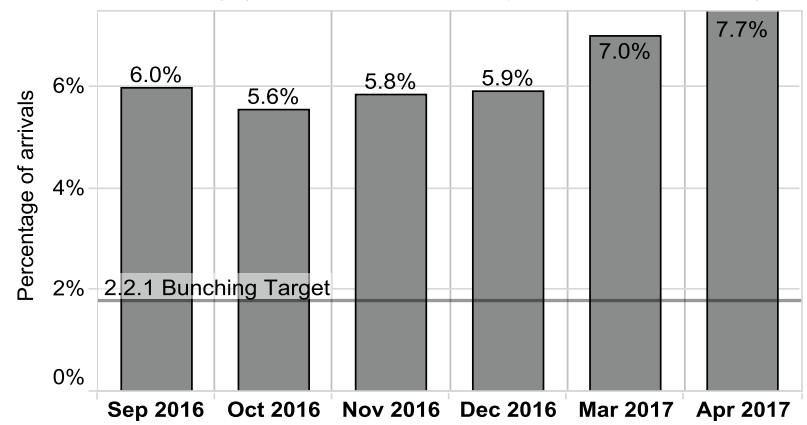
**2.1.7 Percentage of actionable 311 Muni operator conduct complaints addressed within 28 business days**



**2.2.1 Percentage of Rapid Network transit trips with +5 min gaps**



**2.2.1 Percentage of Rapid Network transit trips with <2 min bunching (<1 min for headways of 5 min or less)**



2.1.1 Results are based on a non-probability sample from opt-in SFMTA online survey conducted quarterly and are weighted to reflect the geographic distribution of San Francisco's population.

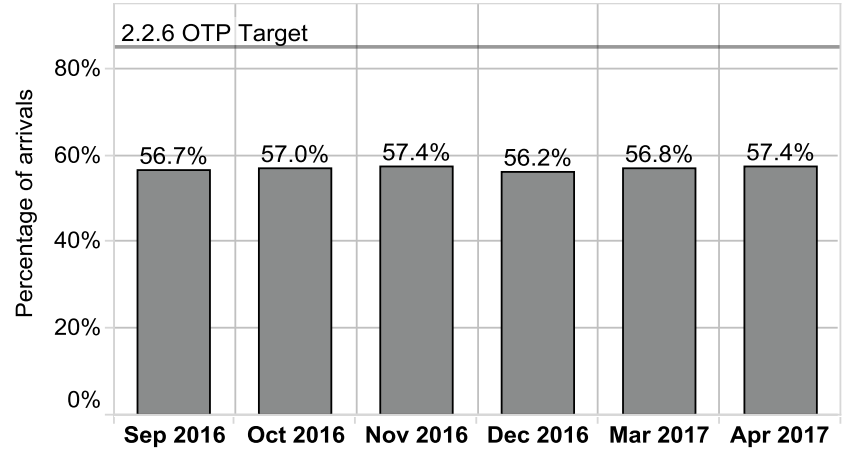
2.1.7 Previously reported "Percentage of actionable 311 Muni operator conduct complaints addressed within 28 business days" results have been revised to reflect updated figures.

Note: Reported results are subject to change as data quality improves or new data become available.

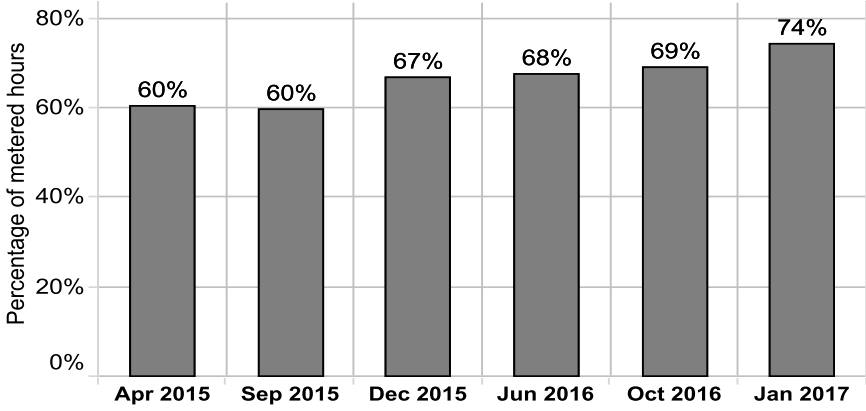
# Goal 2 metrics

## Key performance indicators **continued**

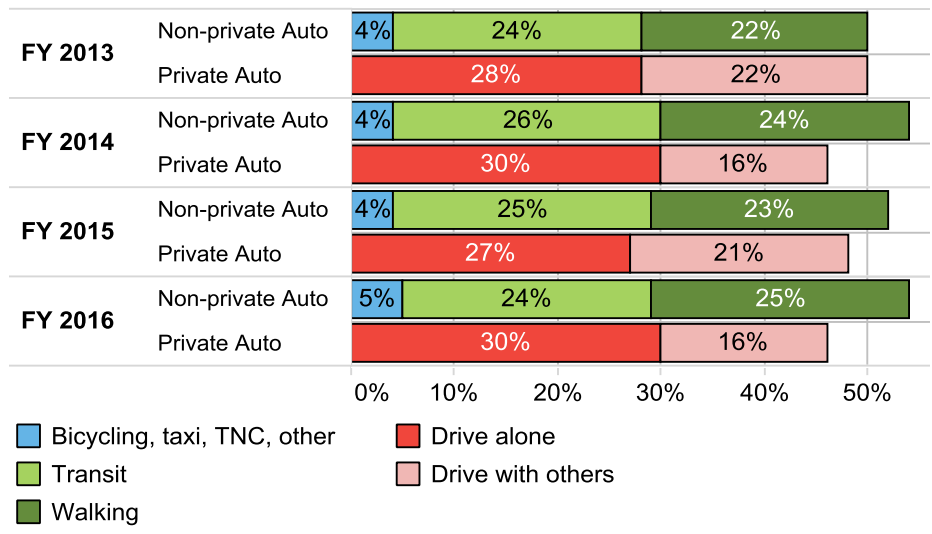
**2.2.6 Percentage of on-time performance**



**2.4.1 Percentage of metered hours with no rate change in SFpark pilot areas**



**2.3.1 Percentage of non-private auto mode share**



Note: Reported results are subject to change as data quality improves or new data become available.

# Goal 3 metrics

## Improve the environment and quality of life in San Francisco

### **Objective 3.1**

Reduce the Agency's and the transportation system's resource consumption, emissions, waste, and noise

### **Objective 3.2**

Increase the transportation system's positive impact to the economy

### **Objective 3.3**

Allocate capital resources effectively

### **Objective 3.4**

Deliver services efficiently

### **Objective 3.5**

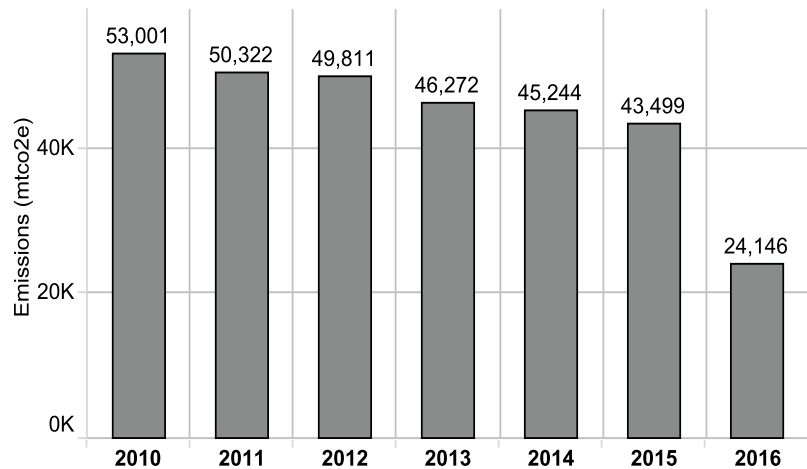
Reduce capital and operating structural deficits



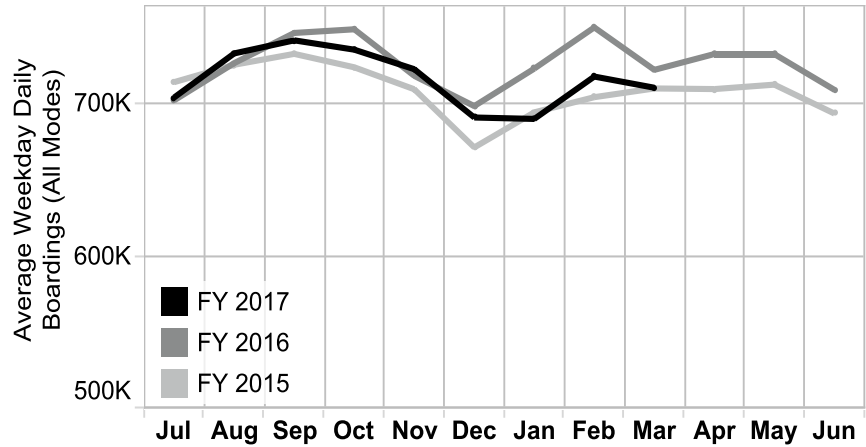
# Goal 3 metrics

## Key performance indicators

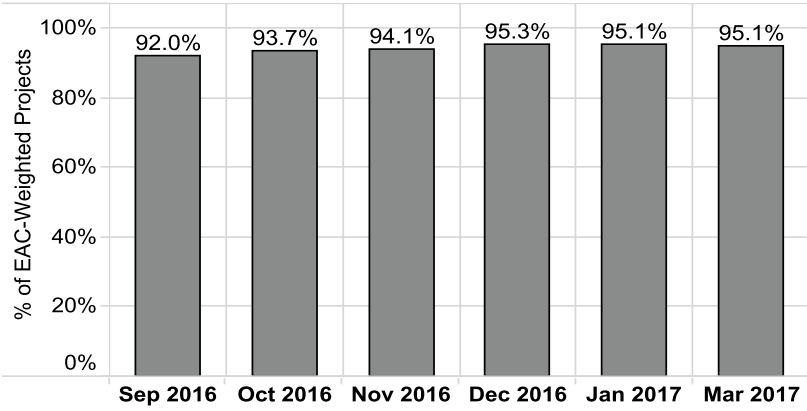
3.1.1 SFMTA carbon footprint (metric tons CO2e)



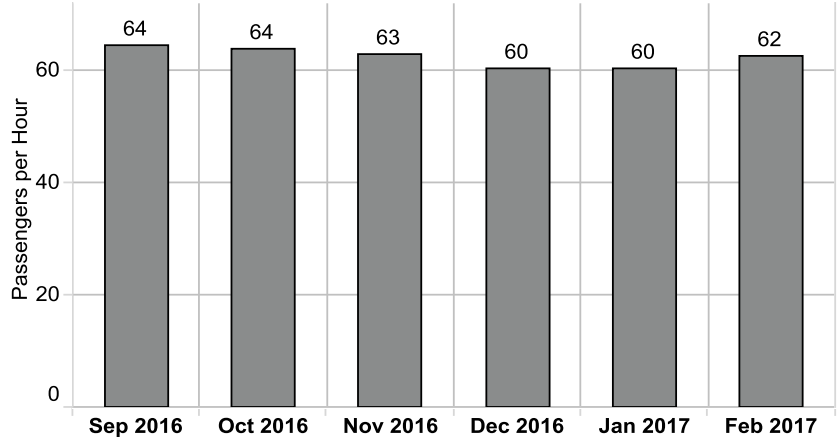
3.2.1 Muni average weekday boardings



3.3.1 Percentage of all capital projects delivered on-budget



3.4.1 Transit passengers per hour

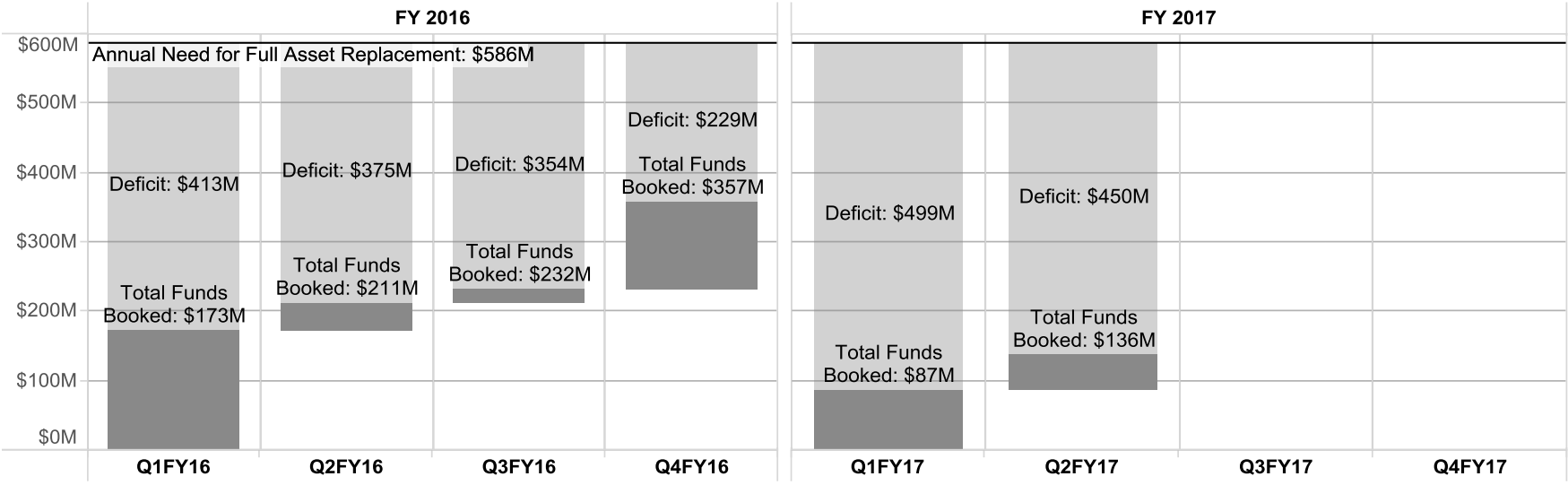


3.3.1 Reported results currently exclude projects in the Sustainable Streets Division portfolio. No data for reporting project delivery budget performance is available for February 2017.  
 Note: Reported results are subject to change as data quality improves or new data become available.

# Goal 3 metrics

## Key performance indicators continued

3.5.1 Structural capital budget deficit (SGR)



# Goal 3 financials

## Expenditures (FY17 as of March 2017)

EXPENDITURES	Revised Budget <sup>(1)</sup>	Actuals Year to Date	Encumbrances	Total Projection for the Year <sup>(2)</sup>	Saving / (Overage)
SFMTA Agency Wide	\$132,338,325	\$97,560,113	\$18,008,464	\$123,626,860	\$8,711,465
Board of Directors	\$698,471	\$497,714	\$35,340	\$697,618	\$853
Capital Programs and Construction	\$175,073	\$3,676,410	\$1,853,564	\$175,073	\$0
Communications	\$8,460,911	\$3,554,232	\$1,144,128	\$6,744,122	\$1,716,789
Director of Transportation	\$1,965,649	\$682,650	\$513,695	\$1,815,303	\$150,346
Finance and Information Technology	\$116,450,602	\$63,347,655	\$25,831,282	\$113,550,653	\$2,899,949
Government Affairs	\$1,332,093	\$687,238	\$221,333	\$1,207,859	\$124,234
Human Resources	\$38,477,646	\$22,070,886	\$4,251,633	\$38,677,615	(\$199,969)
Safety	\$5,914,417	\$2,883,281	\$2,027,974	\$6,107,965	(\$193,548)
Sustainable Streets	\$153,610,186	\$96,298,386	\$24,680,095	\$152,550,864	\$1,059,322
Transit Services	\$616,683,023	\$431,343,080	\$52,530,982	\$631,425,477	(\$14,742,454)
Taxi and Accessible Services	\$34,061,120	\$17,107,942	\$14,630,461	\$33,513,125	\$547,995
<b>TOTAL</b>	<b>\$1,110,167,516</b>	<b>\$739,709,587</b>	<b>\$145,728,951</b>	<b>\$1,110,092,534</b>	<b>\$74,982</b>

(1) Revised budget includes encumbrance and equipment carry forward from FY16 of \$59.2 million.

(2) Expenditures projection is based on all encumbrance spent in FY2017, without carry forward to next fiscal year.

# Goal 3 financials

## Revenues (FY17 as of March 2017)

REVENUE	Revised Budget	Actuals Year to Date	Total Projection for the Year	Surplus/(Deficit)
<b>TRANSIT FARES</b>				
Cable Car Fares	\$27,725,000	\$19,474,480	\$27,725,000	\$0
Cash Fares	\$84,550,000	\$60,370,105	\$83,002,286	(\$1,547,714)
Other Fares	\$4,240,000	\$3,289,808	\$4,240,000	\$0
Passes	\$89,365,000	\$64,758,705	\$85,502,976	(\$3,862,024)
<b>TRANSIT FARES Total</b>	<b>\$205,880,000</b>	<b>\$147,893,098</b>	<b>\$200,470,262</b>	<b>(\$5,409,738)</b>
<b>PARKING FEES &amp; FINES</b>				
General Fund Baseline Transfer	\$74,260,000	\$55,695,000	\$67,760,000	(\$6,500,000)
Citations and Fines	\$104,998,892	\$87,430,891	\$114,443,958	\$9,445,066
Garage Revenue	\$70,577,578	\$49,191,141	\$66,055,038	(\$4,522,540)
Meter Revenue	\$58,411,840	\$49,350,495	\$64,555,391	\$6,143,551
Permit Revenue	\$16,282,000	\$12,565,412	\$17,233,003	\$951,003
<b>PARKING FEES &amp; FINES Total</b>	<b>\$324,530,310</b>	<b>\$254,232,939</b>	<b>\$330,047,390</b>	<b>\$5,517,080</b>
Operating Grants	\$134,502,152	\$81,818,554	\$132,906,188	(\$1,595,964)
Taxi Service	\$8,375,682	\$1,882,279	\$3,050,484	(\$5,325,198)
Other Revenues	\$32,827,525	\$25,156,855	\$32,641,345	(\$186,180)
General Fund Transfer	\$291,540,000	\$218,655,000	\$305,190,000	\$13,650,000
Fund Balance for Current Year Budget	\$45,000,000	\$45,000,000	\$45,000,000	\$0
Transfer from Non-operating Fund	\$13,521,286	\$5,027,042	\$13,521,286	\$0
Fund Balance from Prior Year Encumbrance Carry Forward	\$59,217,156	\$59,217,156	\$59,217,156	\$0
<b>TOTAL</b>	<b>\$1,115,394,111</b>	<b>\$838,882,923</b>	<b>\$1,122,044,111</b>	<b>\$6,650,000</b>

# Goal 3 financials

## Overtime Report (FY17 as of PPE 03.24.2017)

FUND/DIVISION	ANNUAL REVISED BUDGET	ACTUAL FISCAL YEAR TO DATE <sup>(3)</sup>	PROJECTION FOR REMAINING MONTHS <sup>(4)</sup>	END OF YEAR PROJECTION	SURPLUS (DEFICIT)
<b>OPERATING FUND</b>					
<b>TRANSIT SERVICES DIVISION</b>					
Transit Operators	\$23,586,620	\$21,733,940	\$7,965,318.28	\$29,699,257	(\$6,112,637)
Transit Vehicle Maintenance	\$6,718,500	\$9,793,481	\$3,581,346	\$13,374,827	(\$6,656,327)
Transit – All Others	\$4,544,031	\$5,750,455	(\$1,160,102)	\$7,259,380	(\$2,715,349)
<b>Subtotal Transit Services Division</b>	<b>\$34,849,151</b>	<b>\$37,277,876</b>	<b>\$10,386,562</b>	<b>\$50,333,464</b>	<b>(\$15,484,313)</b>
<b>SUSTAINABLE STREETS DIVISION</b>					
Parking Control Officers	\$994,984	\$0	-\$644,012	(\$644,012)	\$1,638,996
Sustainable Streets – All Others	\$794,714	\$354,022	(\$1,959,743)	\$398,763	\$395,951
<b>Subtotal Sustainable Streets Division</b>	<b>\$1,789,698</b>	<b>\$354,022</b>	<b>(\$2,603,755)</b>	<b>(\$245,249)</b>	<b>\$2,034,947</b>
<b>SFMTA AGENCY WIDE</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>ALL OTHER DIVISIONS</b>	<b>\$709,466</b>	<b>\$707,012</b>	<b>\$255,765</b>	<b>\$962,778</b>	<b>(\$253,312)</b>
<b>TOTAL OPERATING FUND</b>	<b>\$37,348,315</b>	<b>\$38,338,910</b>	<b>\$8,038,572</b>	<b>\$51,050,993</b>	<b>(\$13,702,678)</b>
<b>NON OPERATING FUND</b>					
Capital Programs & Construction	\$0	\$1,589,550	\$582,558	\$2,172,108	(\$2,172,108)
Sustainable Streets Engineering Programs	\$0	\$455,322	\$166,872	\$622,194	(\$622,194)
<b>Total Non-Operating Fund</b>	<b>\$0</b>	<b>\$2,044,872</b>	<b>\$749,430</b>	<b>\$2,794,302</b>	<b>(\$2,794,302)</b>
<b>TOTAL</b>	<b>\$37,348,315</b>	<b>\$40,383,782</b>	<b>\$8,788,002</b>	<b>\$53,845,295</b>	<b>(\$16,496,980)</b>

<sup>(3)</sup> Reported overtime actuals and resulting deficit are net of cost recovery for events or services that includes reimbursements for payroll (both regular and overtime), overhead, and other non-labor costs as applicable. The total actual cost recoveries is \$4,674K.

<sup>(4)</sup> Included: FY2016 cost recovery of \$7,725K, as projection for FY2017.